Making Service Decisions Based on Evidence

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BACKGROUND

Usability testing and a user survey were conducted to better understand user perceptions and to aid decision-making about Interlibrary Loan (ILL) and Document Delivery (DD) cost and user experience.

Why? The problem

- Strong, differing opinions about service interface and user experience
- Decisions made on anecdotal evidence from users, i.e., non-users and reasons missing from the picture

What? The solution

An IRB-approved study to gather evidence using multiple methods:

- Usability Study (reported here)
- Survey (reported here)
- Technical Analysis
- Financial Analysis
- Institutional Inquiry

When?

- October 2010 – August 2011

Who?

- Cross-functional task force from administration, interlibrary loan, public services, and information technology
- Chaired by a senior manager

METHODS

Usability Study

10 usability test sessions were conducted with participants recruited from the UNC Health Affairs schools. Participants were asked to think aloud while completing a series of (known item) search tasks. Post-task and post-test interviews and questionnaires were administered to measure user satisfaction and perceptions.

Survey

An IRB-approved online survey was administered via Qualtrics for one month using questions from instrument in the literature augmented with service-specific questions. 70 of 87 responses were analyzed for self-reported usage patterns, awareness of service availability and service costs, performance, expectations and service satisfaction.

LESSONS LEARNED

This evidence-based approach really works!

- helped produce consensus and create buy-in
- moved group from anecdotal opinions/perceptions to objective fact
- having effort led by an "outsider" had (mostly) advantages
- multi-modal approach built the big picture
- confirmed strengths as well as identified areas needing improvement
- may learn more than you thought you would

IRB process could be improved and shortened

- would have liked help at the beginning

Communication is key

- solicited feedback from affected staff throughout process
- noticed info gaps (e.g., a page for each subgroup, none for on-campus affiliates)
- identified and addressed areas of confusion and uncertainty
- told users what the service does!

"Ugh, I remember coming here for the first time. I'm like ok now what do I do? And I had to go to so much hell, let me rephrase that, it wasn't hell, it was just a nuisance. 'Cause I wasn't sure if I was a Health Affairs Affiliate [highlights the text], I just wanted the book and I'm a student here."

Figure 1: "Choose Your Affiliation" screen before

Figure 2: "Choose Your Affiliation" after initial changes to streamline page
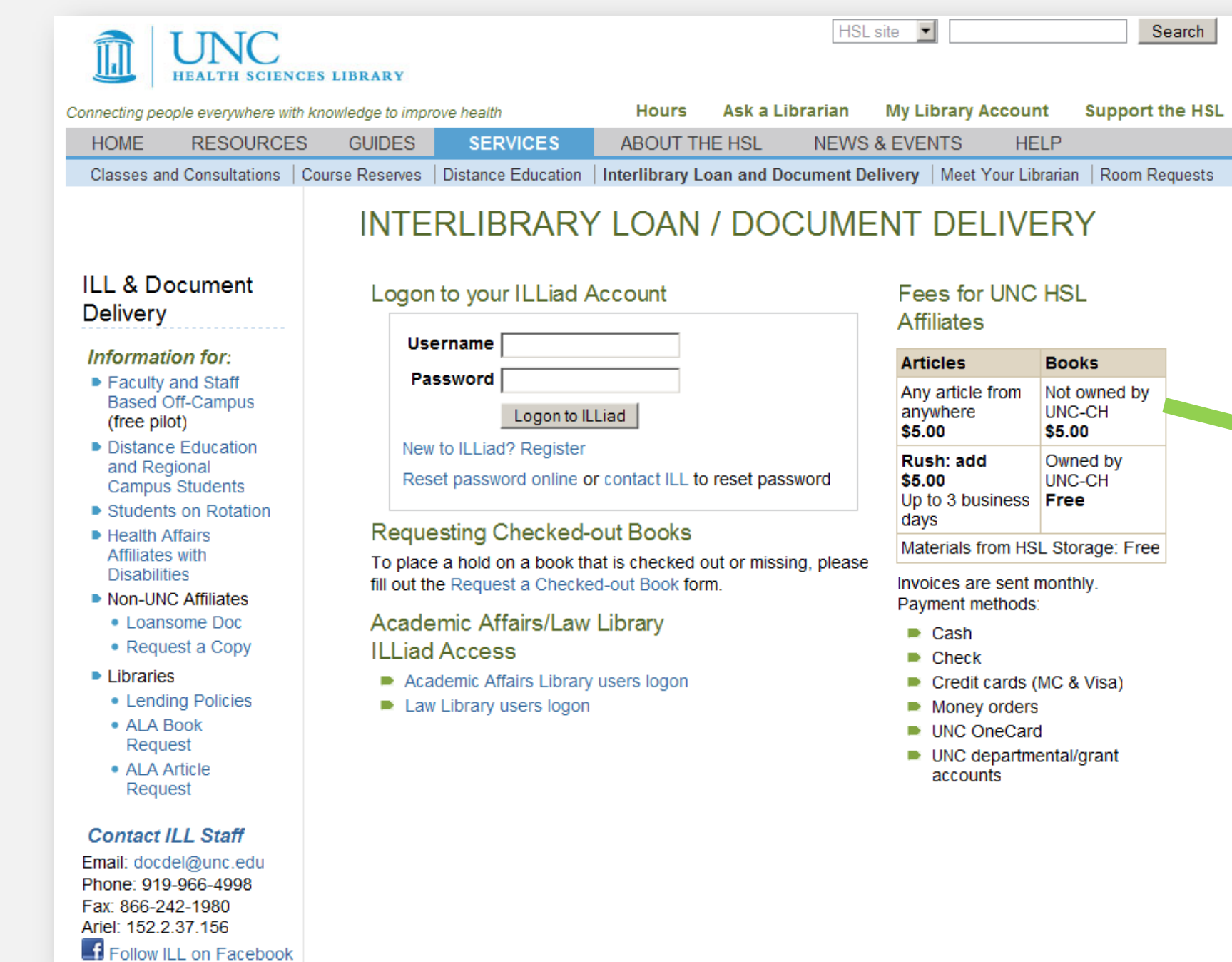
Figure 3: HSL Interlibrary Loan page before
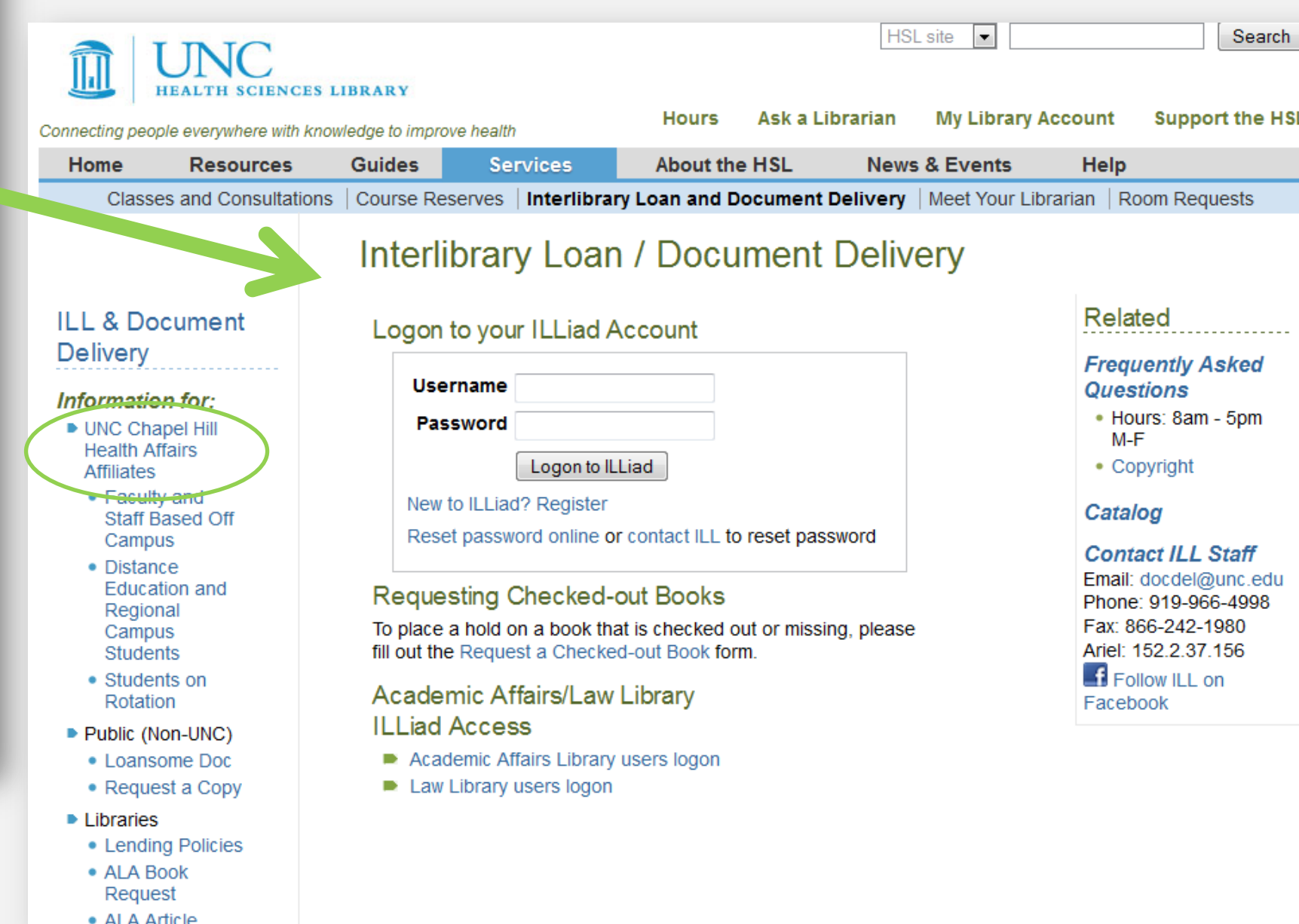
Figure 4:   HSL Interlibrary Loan page after removing fees and adding information for UNC Health Affairs affiliates

"sometimes so if I shrink it and press request again after I've logged on like (demonstrates) then it'll come up, but the first time when you log on it doesn't come up...like already filled out"

Figure 5: HSL Book Request before

"and I'm confident that I wouldn't pay one in the end because if someone said 'oh, this would have cost you something because' 'but I didn't see anything that told me so I shouldn't be charged' - that would be the lawyer part of me."

Figure 6:   HSL Book Request after removing fees and adding instructions, turnaround time, automatic form pre-population, and change default Not Wanted After Date

FINDINGS & RECOMMENDATIONS
(SELECTED)

- **Consider eliminating fees**
  - Not all users could accurately identify the cost of an ILL request. 2 out of 5 participants incorrectly expected article requests to be free (when it would cost $5).
  - Participants were generally confident that they knew the cost of their request (even when they were wrong).
- **Service performance is an area of excellence.**
  - Satisfaction with ILL and DD services is high. 42/45 (93%) of ILL were "satisfied" or "very satisfied", 26/30 (87%) of DD users "satisfied" or "very satisfied"
  - Opening and reading an article was easy. 38/41 (93%) of respondents rated "very easy" or "somewhat easy." 1/41 rated "somewhat difficult."
  - Turnaround time expectations matched actual performance.
- **Increase awareness of campus delivery**
  - More users know about ILL than DD. (93% vs. 77%)
- **ILL/DD is one way to get a resource not available from the library**
  - 32% of respondents would purchase a book (18/57 "use methods such as Amazon or a publisher to obtain items instead of the UNC-CH Libraries, Interlibrary Loan or Document Delivery" from a few times a year to daily. The main circumstance in which they do this is if they want to own the item.)
- **Improve article search and annotate resource lists when possible.**
  - Locating an article or book from a citation was difficult. 2 participants repeatedly unsuccessfully searched by article title in the catalog and web site search.
  - Providing resource name alone was insufficient to some users. Two participants commented that they didn't have enough information to know which resource to use.
- **Add direct access to ILL/DD from search results pages.**
  - "No results found" pages for Electronic Journal, Article and site search don't contain links to ILL/DD. Links from Catalog and Article Linker are not very prominent.
- **Remove requirement for user to choose affiliation**
  - Choose Your Affiliation was confusing and/or annoying to users who just wanted their book/article. 3 participants volunteered comments.
- **Allow Onyen access to ILL system**
  - Participants could successfully register, reset password and log in to ILLiad.
  - Many users expected to use Onyen to log in. Participants were not specifically asked about Onyens, yet two mentioned this expectation. Two participants knew to log in with a separate ILL account from experience. 9 survey respondents mentioned setting up an account/logging in as a dissatisfier.
- **Improve ILL request experience to better match user expectations**
  - Provide immediate confirmation of request success.
  - Prepopulate book and article request forms from the catalog.
  - Add estimates for turnaround time. Participants were unsure how long a request would take to be completed – especially the difference between a rush and a regular request as there is a cost distinction.
  - Shorten the "Not Wanted By" default date. 5 participants thought that the default date was today and not a year from today. 3 participants changed the month or day (not the year) and commented that they expected to receive the item within weeks or months.
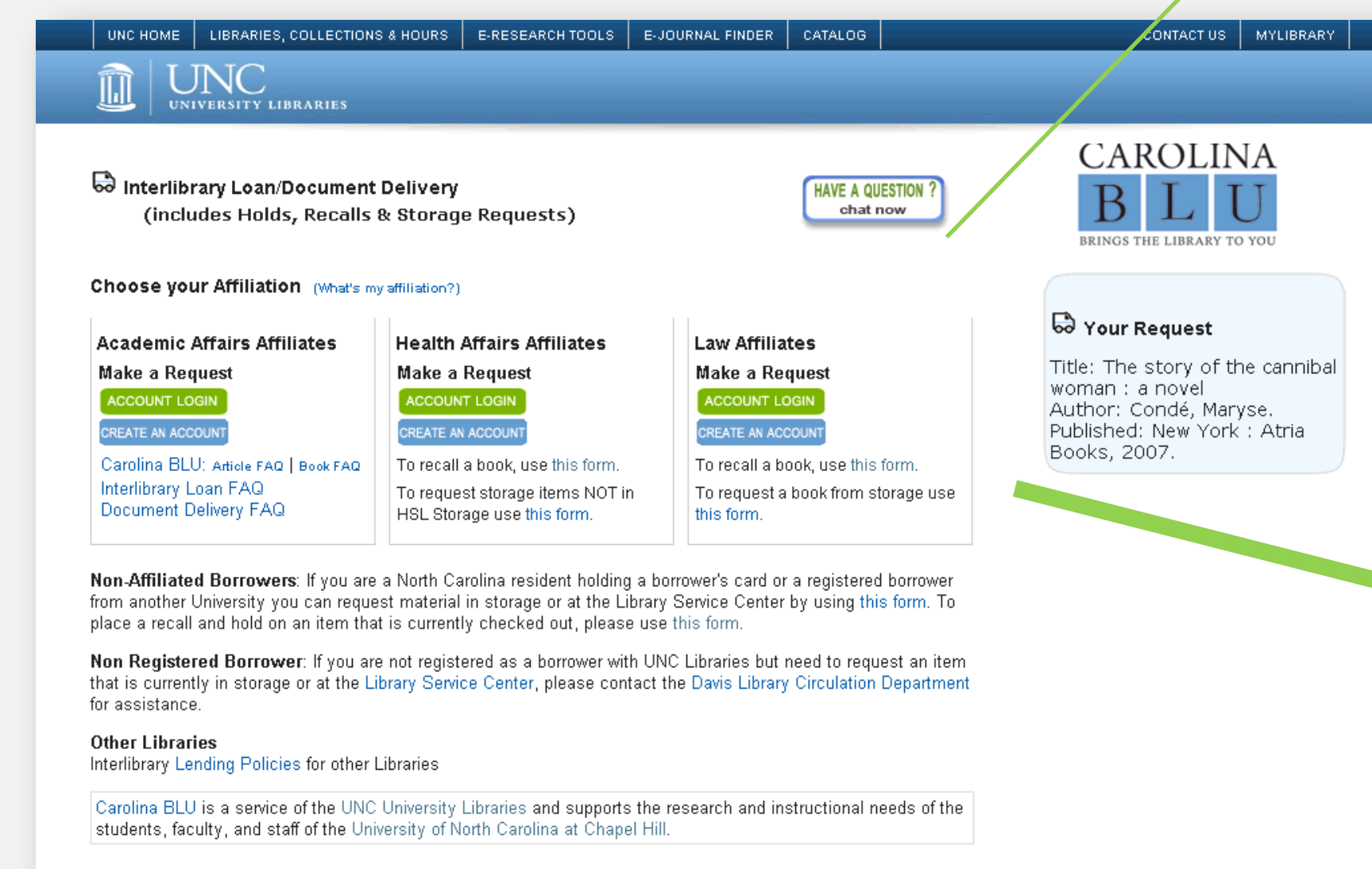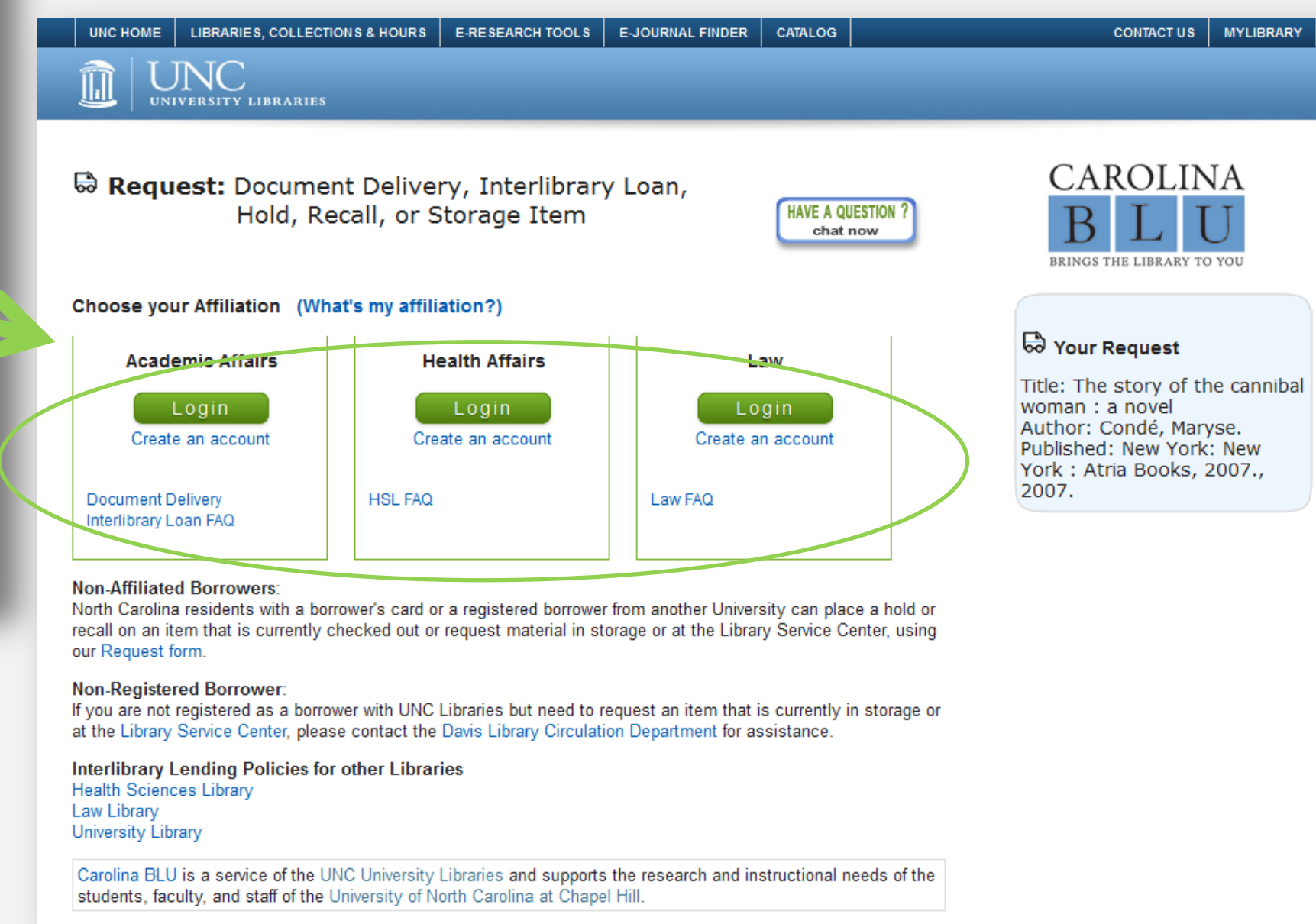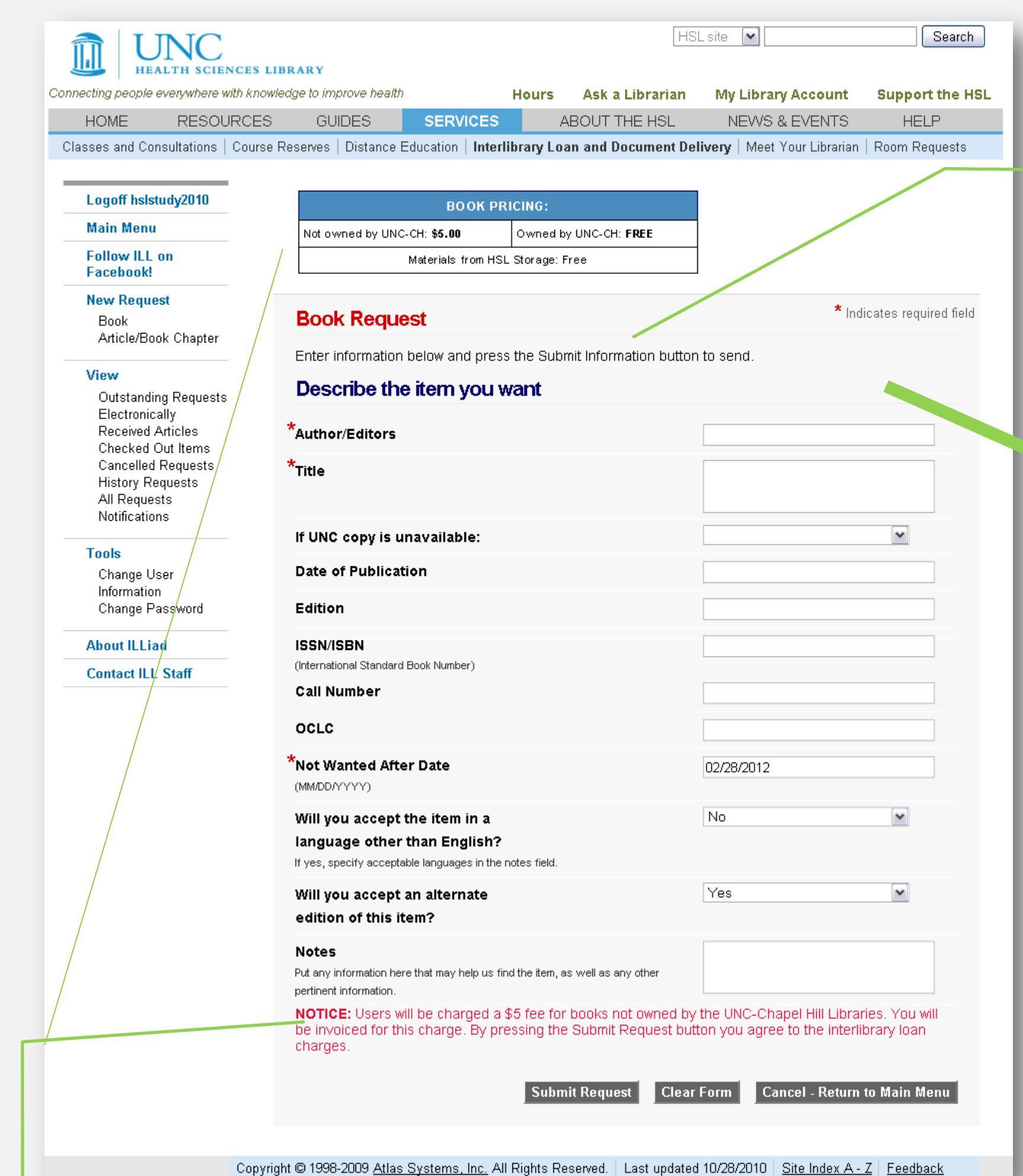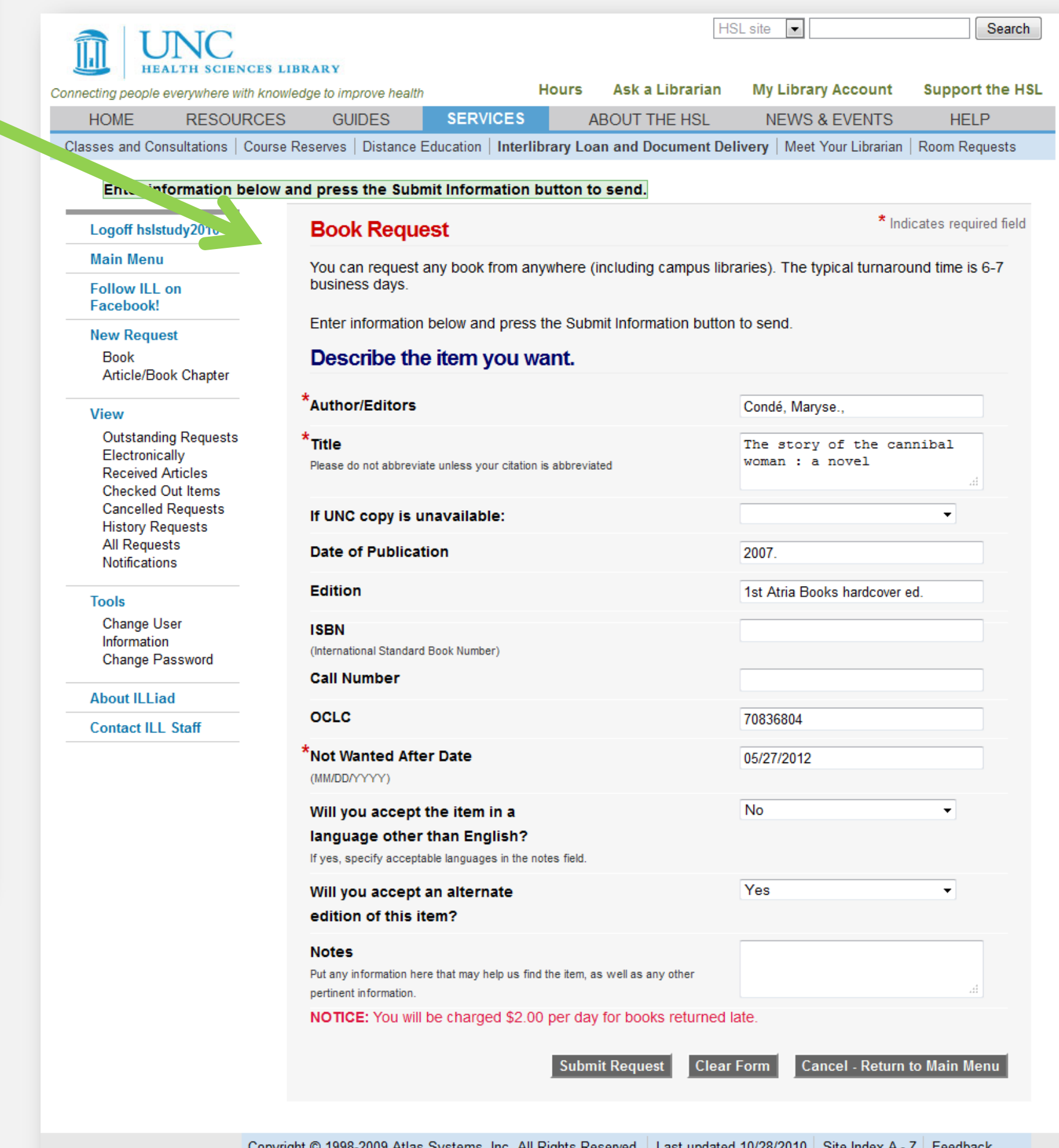
NEXT STEPS

- Repeat usability testing to see if changes were effective (April – May 2012)
- Assess impact of dropping fee on service demand, staffing (ongoing)
- Change to LDAP authentication to allow Onyen login (May 2012)
- Merge patron databases to eliminate need to choose affiliation once registered (May 2012)
- Repeat the user survey to get further feedback (under consideration)